

**-- UNOFFICIAL --****Minority Business Opportunity Center (MBOC)****Competitive Panel Evaluation Form****Preliminary Review Checklist**

NEC Region:	
Funding Period:	April 1, 2008 - March 31, 2009
Geographic Service Area:	
Applicant Name (SF424 signature):	
Organization Name (If different than applicant name):	
Address:	
City, State, Zip	
Telephone:	

**Preliminary Cost Information Section****Please do not enter any data in the gray shaded cells.**

	Year 1	Yr 1 - %	Year 2	Yr 2 - %	Year 3	Yr 3 - %	Total	Total %
<b>Federal Share</b>	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!
Non-Federal Cost Share:								
Client Fees	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!
Cash	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!
In-Kind Share	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!
<b>Total Non-Federal Cost Share (20% Min.)</b>	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!
<b>Total Project Cost</b>	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!

**Disqualification/Rejection of Application**

If either of the following is answered in the negative, the applicant shall be disqualified:

**Please ck yes or no**

	Yes	No
1. Signed application included - OMB Standard Form 424, "Application for Federal Assistance"?		
2. Application received by deadline?		
3. Application is to operate an MBOC?		
(a) Responsive and warrants further evaluation		

**Administrative Review****Note: Please enter all points deducted as a positive number - it will be deducted appropriately**

	Points Deducted
1. Application (paper submission only) in triplicate - one original and two copies? (If no, deduct 1 point)	0.0
2. Table of contents provided? (If no, deduct 1/2 point)	0.0
3. Pages numbered consecutively? (Deduct 1/2 point for any or all missing parts)	0.0
4. Incomplete Program Narratives? (Deduct a total of 1 point for any or all missing parts)	0.0
5. Other Required Forms either missing or not signed as required? (Deduct 2 points)	0.0
<b>Comment for deduction(s) For #5 above, please pecify missing or un signed document.</b>	
<b>Total Deductions</b>	<b>0.0</b>

**Summary of Panel Points Awarded****Please do not enter any data in this section**

	Max Points	Actual Points Awarded	Percent Points Awarded
Section I. Applicant Capability	40	0.0	0%
Section II. Resources	20	0.0	0%
Section III. Techniques & Methodologies	20	0.0	0%
Section IV. Proposed Budget/Costs	20	0.0	0%
<b>Sub-Total</b>	<b>100</b>	<b>0.0</b>	
Section V. Non-Federal Cost Share Bonus	5	0.0	
Administrative Points Deducted		0.0	
<b>Final Score before Oral Presentation</b>	<b>105</b>	<b>0.0</b>	
Section VI. Oral Presentation	10	0.0	
<b>Final Score after Oral Presentation</b>	<b>115</b>	<b>0.0</b>	

**Please do not enter data in the gray Shaded cells.**

Oral Presentations are optional and held only when requested by MBDA (see FFO pg. 57)

 Panelist Name:  
 Signature: \_\_\_\_\_

 Date - Panel Forms: \_\_\_\_\_  
 Summary - Page: 1

**PANELIST INSTRUCTIONS: -**

The competitive review panel will score each MBOC application based upon the evaluation criteria. Points will be given for each evaluation criteria category not to exceed the maximum number of points allowed for each category. Scoring is restricted to the information contained in the application. Previous knowledge concerning the applicant organization or staff may not be taken into consideration at this point.

Scoring sheets have been designed to capture the requirements of the Federal Funding Opportunity Announcement. The rating scales have been designed to give panelists the option of assigning points. Each criterion is provided. However in general, here is a sample range of how points should be allocated:

- a) Zero points if the criteria was not addressed
- b) 0.5 to 1 point if *minimally* addressed. This means the applicant has recognized the criteria but has not provided detailed information.
- c) 1 to 2 points for an *adequate response*. This means that the applicant has recognized the criteria and provided a response that contains some indication that he can satisfy the criteria.
- d) 1.5 to 2.5 points for an *extended response*. This means that the applicant has provided a detailed discussion of the criteria and given evidence that the criteria will be fully met.
- e) 2 to 5 points for an *outstanding response*. This means that the applicant fully understands the requirements as reflected in the discussion of how the criteria will be met. The applicant's response is substantive and examples are provided where appropriate.
- f) Issue points in 0.5 or whole number increments
- g) You will need to use the "View" - Header function to enter the Applicant's Name and Location, and the "Footer" function to enter your name as a panel member and date of paneling.
- h) Start with entering the information highlighted on the 1st page of the Summary sheet.
- i) Enter the required Federal and Non Federal Share in the Preliminary Cost Information Section, do not enter any data in the grey shaded areas.
- j) Administrative Review - Enter the appropriate assigned points if applicable in a positive number. The point will be deducted appropriately.
- k) Summary of Panel Points Awarded - Do not enter any data in this section (grey shaded). Data will be automatically transferred to this section once you rate and score the various criterion sections.
- l) Please provide a comment on all questions that should correspond with your rating. In addition if you do not provide a score for a question, a comment is also required indicating "no information provided" or your reason for no score.
- n) Please do not attempt to alter this form, as doing this may void the calculation formulas.
- o) Comments are mandatory; please refer to the appropriate page number of application when commenting on a specific requirement.

End Summary "Preliminary Review Checklist"

Panelist Name:  
Signature: \_\_\_\_\_

Date - Panel Forms: \_\_\_\_\_  
Summary - Page: 2

**-- UNOFFICIAL --****Minority Business Opportunity Center (MBOC)****Competitive Panel Evaluation Form****Section I. Applicant Capability****Maximum Points Allowable = 40****Total Points Awarded:****-****Percentage Awarded:****0%****Instructions**

For this criterion, the applicant must consider among other things, knowledge of respective economic region, i.e. Minority business demographics, an assessment of the community's needs, prior experience in matchmaking, brokering, coaching and mentoring. An assessment of the community's needs, prior experience in matchmaking, brokering, coaching and mentoring. A critical area of assessment is the applicant's client base and its ability to assess and evaluate clients.

The following information shall be evaluated:

**A. COMMUNITY - Applicant should include a detail narrative discussion of its organization background with emphasis of its knowledge & previous experience in the minority community and minority business sector, and strategies for enhancing its growth and expansion, particular emphasis shall be on expanding SGI Firms.**

**(Maximum 4 Points)****Points Awarded:****-****Panel Definition:**

Experience and knowledge of the Minority community, and minority business sector, and strategies for **enhancing** its growth and **expansion**; particular emphasis shall be on expanding SGI firms. Consideration will be given as to whether the applicant has an establish presence in the geographic service area at the time of its application. "Establish presence" means that the applicant has had an office in the applicable MBOC geographical service area for at least three (3) years preceding the the date of this FF0, and has established working relationships with purchasing and financing organizations in such ar area.

**i) To what extent does the applicant provide a narrative discussion and related successfully client outcomes of its organization background, emphasizing its knowledge and experience of the Minority community, and minority business sector within the geographic service area? [2 points max]**

Rating Scale - points, if addressed:

**Zero points if not addressed**

0.5 pts at minimal level; 1.0 pts. at adequate level

1.5 pts. at extended level; 2.0 pts. at outstanding level

Points

**-****Panelist Comments:**

**ii) To what extent does the applicant demonstrate the experience and strategies for enhancing the Minority and Minority business sector growth in the defined geographic service area? (1 point max.)**

Points

**-**

Rating Scale - points, if addressed:

**Zero points if not addressed**

0.5 pts at minimal level; 1.0 pts. at adequate level or better

**Panelist Comments:**

Panelist Name:

Initials: \_\_\_\_\_

iii) To what extent does the applicant demonstrate knowledge of expanding  
SGIs and/or rapid growth-potential clients in the defined geographic service area?  
(1 point max.)

Points

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better  
**Zero points if not addressed**

**Panelist Comments:**

**B. Business Consulting**  
(Maximum 5 points)

Points Awarded:

**Panel Definition:**

Experience and knowledge of coaching and mentoring techniques related to serving SGI & rapid growth-potential minority firms. - Evaluate applicant's discussion on related client outcomes.

i) To what extent does the applicant demonstrate experience in or knowledge of  
of business consulting with respect to minority firms with emphasis on SGI firms in the  
the geographic service area, and related client outcomes? (5 points max.)

Points

Rating Scale - points, if addressed: 1.0 pts at minimal level; 2.5 pts. at adequate level  
**Zero points if not addressed** 3.5 pts. at extended level; 5.0 pts. at outstanding level

**Panelist Comments:**

Panelist Name:  
Initials: \_\_\_\_\_

**C. Financing**  
**(Maximum 5 points)****Points Awarded****-****Panel Definition**

Experience in and knowledge of the preparation and formulation of successful financial transactions. Evaluate the applicant organization's professional working relationships within and outside of the area with minorities and non-minority financial institutions. In addition, review any other public/private sector involvement that the applicant and/or its proposed staff may have in obtaining financings that could assist them in operating the MBOC. The MBOC Operator must implement a process that results in the award of contract and financial transactions to MBE clients.

- i. To what extent does the applicant provide a discussion on how they would implement a process that results in the awards of financial transactions to MBE clients by means of, (a) development and maintenance of database/listing of viable MBEs (b) Development and maintenance of a database listing of potential financial opportunities (c) Establishment of client relationships; and (d) brokering awarded financial transactions for MBEs. [3.0 points max]

Points

**-**

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. At adequate level

2.0 pts. At extended level; 3.0 pts At outstanding level

**Panelist Comments:**

- ii. To what extent does the applicant demonstrate experience in matching & producing loan packages and/or bonds applicable to MBEs with sources of capital ? [1 point max]

Points

**-**

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

**Panelist Comments:**

- iii. To what extent does the applicant demonstrate experience in producing or assisting with equity/venture capital, and were success stories provided? (1 points max.)

Points

**-**

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level

**Panelist Comments:**

Panelist Name:

Initials: \_\_\_\_\_

**D. Procurement and Contracting  
(Maximum 5 points)****Points Awarded****-*****Panel Definition***

Discuss the applicant's experience in and knowledge of public and private sector contracting opportunities for Minority entities and other minority businesses, as well as demonstrated expertise in assisting clients into supply chains. (5 points max.)

The applicant should provide key and/or support staff background in support of proposal claims. Staff experience should demonstrate the ability to facilitate and/or structure procurements, bids, etc. The applicant should provide information about its ability to work with large buying organizations and procurement/contracting officials.

- i. To what extent does the applicant provide a discussion on how they would implement a process that results in the award of procurement/contracting transactions to MBE clients by means of; (a) development of maintenance of a database listing of viable MBEs; (b) the development and maintenance of a database listing of potential procurement/contracting opportunities; (c ) establishment of client relationship; and (d) brokering awarded procurement and contracting transactions to MBEs? [3 points max]**

Points

**-**

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level  
Zero points if not addressed 2.0 pts at extended level; 3.0 pts at outstanding level

**Panelist Comments:**

- ii. To what extent does the applicant have experience in facilitating contracts and procurments to minority entities, and expertise in assisting MBE clients into supply chains? [1 point max]**

Points

**-**

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level  
Zero points if not addressed

**Panelist Comments:**

Panelist Name:  
Initials: \_\_\_\_\_

iii. To what extent does the applicant demonstrate an ability to assist  
Minority entities the areas of joint ventures and/or teaming, and were actual  
success stories provided? [1 point max]

Points

-

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

Panelist Comments:

### E. Financing Networks (Maximum 5 points)

Points Awarded

-

#### Panel Definition

Assess the applicant's resources and professional relationships within the corporate, banking and investment community that may be beneficial to minority-owned firms.

i. To what extent does the applicant's proposal reflect knowledge of the resources  
and professional relationships within the corporate, banking and investment  
community that can be beneficial to minority-owned firms? (2 points max.)

Points

-

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

ii. To what extent does the applicant demonstrate working relationships with  
financial institutions capable to provide loans (alternative and/or standard) financings  
to Minority owned firms? (1 point max.)

Points

-

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Panelist Name:

Initials: \_\_\_\_\_

Zero points if not addressed

**Panelist Comments:**

iii. To what extent does the applicant demonstrate working relationships with financial institutions capable to provide bonds (alternative and/or standard) to MBE clients in the construction industries? (1 point max.)

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

**Panelist Comments:**

iv. To what extent does the applicant demonstrate working relationships with financial entities capable of providing equity and/or venture capital to Minority firms? (1 point max.)

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

**Panelist Comments:**
**F. Establishment of a Self-Sustainable Service Model  
(Maximum 3 points)**

Points Awarded

-

**Panel Definition**

Assess the applicant's summary plan to establish a self-sustainable model for continued services to the Minority community and MBE clients beyond the MBDA funding cycle.

i. To what extent does the applicant describe a plan to establish self-sustaining model for continuing to serve the MBE community beyond receipt of MBDA funds? (2 point maximum)

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Name:  
Initials: \_\_\_\_\_



**Panelist Comments:****ii. To what extent is the applicant's concept for building a self-sustainable model feasible for execution in 3 years or sooner? (1 point maximum)**

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

**Panelist Comments:****G. MBE Advocacy  
(Maximum 3 points)**

Points

-

***Panel Definition***

Discuss the applicant's experience and expertise in advocating on behalf of the Minority communities, and Minority businesses, both as to specific transactions in which a minority business seeks to engage and as to broaden

**i. To what extent does the applicant demonstrate prior activity that broadens market opportunities for all minority businesses? (2 point maximum)**

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:****ii. To what extent does the applicant demonstrate prior activity that yields specific transactions for Minority businesses? (1 point maximum)**

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

**Panelist Comments:**Panelist Name:  
Initials: \_\_\_\_\_

**H. Key Staff**

Points

-

**(Maximum 10 points)****Panel Definition**

Assess the applicant's qualifications, experience and proposed role of staff who will operate the MBOC. In particular, make an assessment that determines whether the proposed key staff possess the expertise in utilizing information systems and the ability to successfully deliver services as outlined in the work requirements. At a minimum the applicant must identify a proposed director.

- i. **Applicant provides the following documents for the project director (a) letter of commitment, (b) resume, (c) copy of college transcripts, (d) qualification standards/ and position descriptions. For all other key staff members, resumes, position descriptions, and qualification standards are required. There is no requirement for the Operator or other key staff to submit college transcripts or letter of commitment. [2 points max]**

Points

-

Rating Scale - points, if addressed:

Zero points if not addressed

Zero points if P.D. less than 100% time

0.5 pts if one of three items provided for P.D.

1.0 pts if two of three items provided for P.D.

1.5 pts if three of three items provided for P.D.

0.5 pts can be added if resume(s) for other key staff are provided

**Panelist Comments:**

- ii. **To what extent does the proposed staff (not contractors) have experience in working with SGI and/or rapid growth-potential clients? (2 point max.)**

Points

-

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:**

- iii. **To what extent does the proposed staff have experience in access to capital; securing financial transactions for potential clients? (2 point max.)**

Points

-

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Name:

Initials: \_\_\_\_\_

**Panelist Comments:**

- iv. To what extent does the proposed staff have experience in access to markets; securing procurement/contracting opportunities with private and/or public entities for potential clients? (2 points max.)

Points

-

Rating Scale - points, if addressed:  
Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better  
1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:**

- v. To what extent do the qualifications, experience and proposed role of staff posses the expertise in utilizing information systems? (1 point max.)

Points

-

Rating Scale - points, if addressed:  
Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

**Panelist Comments:**

- vi. To what extent does the applicant maximize total number brokering/consulting hours available for the MBOC in a program year? (1 points max.)

Points

-

Calculation = (total brokering hrs+marketing hours)/total staff hours

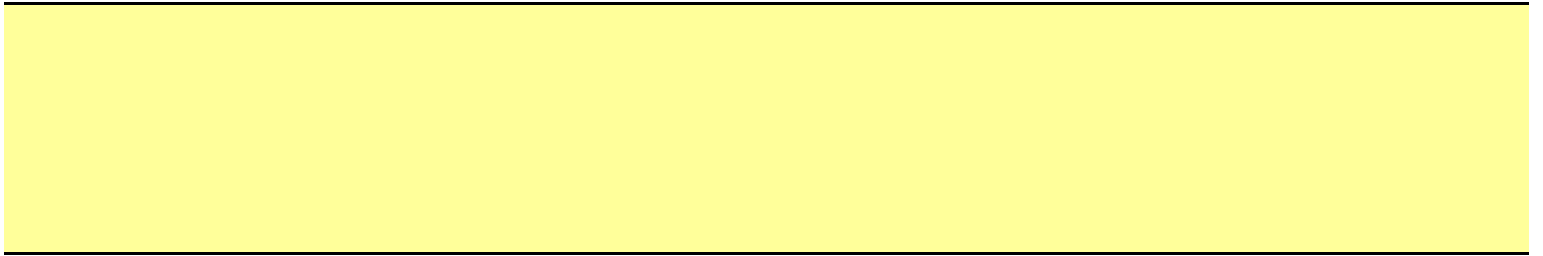
Note: total consulting hours = staff and outside consulting resources

Rating Scale - points, if addressed:  
Zero points if not addressed  
Zero points if less than 60%

0.5 pts if % of total available consulting hours/yr = 60-69.9%  
1.0 pts if % of total available consulting hours/yr = 70% or greater

**Panelist Comments:**

Panelist Name:  
Initials: \_\_\_\_\_



**End Section I**

**-- UNOFFICIAL --****Minority Business Opportunity Center (MBOC)****Competitive Panel Evaluation Form****Section II. Resources****Maximum Points Allowable = 20****Total Points Awarded:****0.0****Percentage Awarded:****0%****Instructions****Please do not enter data in gray cells**

For this criterion, the applicant must show how it plans to carry out the MBOC work requirements as related to resources.

**A. Resources****Points Awarded****-****(Maximum 8 points)****Panel Definition:**

Assess those resources (not included as part of non-federal cost sharing) that will be used, including (but not limited to) existing prior and/or current data lists that will serve in fostering immediate success for the MBOC.

**i. Does the applicant provide a list of established resource providers?****Points****-****For example: banks, financial institutions, bonding companies, business consultants, chambers of commerce, trade associations, state, local, and private technical assistance, providers that are available to assist minority companies? (2 points max.)**

Rating Scale - points, if addressed:

**Zero points if not addressed**

0.5 pts at minimal level; 1.0 pts. at adequate level or better

1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:****ii. Does the applicant demonstrate the ability to conduct ongoing analysis of procurement and financial databases? (2 points max.)****Points****-**

Rating Scale - points, if addressed:

**Zero points if not addressed**

0.5 pts at minimal level; 1.0 pts. at adequate level or better

1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:**

Panelist Name:

Initials: \_\_\_\_\_

iii. Does the applicant discuss what resources will be utilized to accomplish the work requirements (not included as part of the cost-sharing arrangement)? (2 points max)

Points

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:**

iv. Does the applicant discuss how it plans to establish and maintain a network of resources? (2 points max.)

Points

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:**

**B. Location**  
(Maximum 2 points)

**Points Awarded****Panel Definition:**

Assessment of the Applicant's strategic rationale for the proposed physical location of the MBEC. Applicant is encouraged to establish a location for the MBEC. It is encouraged to establish location in a building which is separate and apart from any of its existing offices in the geographic service area.

i. Does the applicant provide proof that MBOC will be located separate and apart from existing operator offices? (2 points max.)

Points

Rating Scale - points, if addressed:

2 pts. if proposed

Zero points if not addressed

Zero points if proposed office allocated less than 51% of budget and resources.

**Panelist Comments:**

Panelist Name:

Initials: \_\_\_\_\_

**C. Partners****Points Awarded****-**

(Maximum 5 points)

**Panel Definition:**

Applicant must indicate how it intends to establish and maintain the network of Committee members and how these partners will support the MBOC to meet its performance objectives.

Points

- i. To what extent does the applicant provide a detailed plan regarding how the committee and subcommittees will be established and the objective for each throughout the program year. [2 points max]

**(2 points max.)**

Rating Scale - points, if addressed:

**Zero points if not addressed**

0.5 pts at minimal level; 1.0 pts. at adequate level or better

1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:**

- ii. To what extent does the applicant provide a discussion as to how the committee members will support the MBOC to meet its performance goals (budget) and objectives?.

Points

**(3 points max.)**

Rating Scale - points, if addressed:

**Zero points if not addressed**

0.5 pts at minimal level; 1.5 pts. at adequate level or better

2.0 pts at extended level; 3.0 pts at outstanding level

**Panelist Comments:**

Panelist Name:

Initials: \_\_\_\_\_

**D. Equipment**

(Maximum 5 points)

**Points Awarded****-****Panel Definition**

Assess how the applicant intends to accomplish the computer, hardware and software requirements.  
 Note, it is permissible for the applicant to propose computers that are older than 2 but less than 4 years.  
 In order to waive computer age limitation, applicant must provide documentation to support internal hardware meets computer requirements as outlined in the FFO. Please refer to program manager for assistance.

**i. To what extent has the applicant met the computer requirements with respect to hardware and age of computers? (1 point max)**

Points

Rating Scale - points, if addressed: 0.5 pt at minimal level; 1.0 pts. at adequate level  
 Zero points if not addressed

**Panelist Comments:**

**ii. Does the applicant provide (a) network map, (b) agreement to adhere to MBDA security requirements? (3 points max.)**

Points

Rating Scale - points, if addressed: 1.5 pts. for item (a) network map  
 Zero points if not addressed per item 1.5 pts. for item (b) agreement to security requirements  
 Please provide sum of two in box

**Panelist Comments:**

**iii. To what extent has the applicant proposal demonstrate adherence to meeting website, URL and Internet information requirements? (1 point max.)**

Points

Rating Scale - points, if addressed: 0.5 pt at minimal level; 1.0 pts. at adequate level

Panelist Name:

Initials: \_\_\_\_\_



Zero points if not addressed

**Panelist Comments:**

End Section II

Panelist Name:  
Initials: \_\_\_\_\_



S

**-- UNOFFICIAL --****Minority Business Opportunity Center (MBOC)****Competitive Panel Evaluation Form****Section III. Techniques and Methodologies****Maximum Points Allowable = 20****Total Points Awarded:****-****Percentage Awarded:****0%****Instructions****Please do not enter data in gray cells**

For this criterion, the applicant must show how it plans to carry out the MBOC work requirements.

It is important that the applicant adhere as much as possible to MBDA's programmatic requirements that are defined in the FFO.

**A. Performance Measures  
(Maximum 10 Points)****Points Awarded:****-****Panel Definition:**

Assess the proposal for each program year, the manner in which the applicant relates each performance measure to the financial information and market resources available in the geographic service area (including existing client list); how the applicant will create MBOC brand recognition (marketing plan); and how the applicant will satisfy program performance goals. In particular, emphasis may be placed on the manner in which the applicant matches MBOC performance goals with client service hours and how it accounts for existing market conditions in its strategy to achieve such goals.

**i. To what extent does the applicant propose to meet and or exceed the minimum performance levels? (2 points max.)****Points****-**

Rating Scale - pts if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

**Zero points if not addressed**

1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:****ii. To what extent does the applicant's proposal demonstrate its ability and capacity for understanding its existing market conditions and how it plans to use this knowledge in achieving its goals? (2 points max.)****-**

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

**Zero points if not addressed**

1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:**

Panelist Name:

Initials: \_\_\_\_\_

iii. To what extent does the applicant's proposal reflect a system that corresponds to or may compliment MBDA's tracking and validating contracts and financings? ( 2 point max.)

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better  
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

iv. To what extent does the applicant relate each performance measure to the financial, information and market resources available in the defined geographic service area? (2 points max.)

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better  
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

v. To what extent does the applicant's performance outcomes match the proposed quarterly performance breakdown and estimated client service hours delivered to clients by MBOC/MBE annual sales range. These hours must correspond to the applicant's proposed budget. (2 points max.)

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better  
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

B. Start-up Phase

Points Awarded:

-

Panelist Name:  
Initials: \_\_\_\_\_

**(Maximum 3 Points)****Panel Definition:**

Assess the proposal as to how the applicant will commence MBOC operations within the initial 30 day period. The MBOC shall have thirty (30) days to become fully operational after an award is made. (see FFO Appendix A, Work and Training Requirements). Fully operational means that all staff is hired, signs are up, furniture and equipment are in place and operational, all necessary forms are developed (e.g., client engagement letters, other standard correspondence etc.) and the Center is ready to open its doors to the public.

- i. Program Operators have 30 days to become fully operational after an award is made, does the applicant give assurance that this will happen. Fully operational means that all staff is hired, all signs are up, all items of furniture and equipment are in place and operational, all stationery forms are developed and the Center is ready to open its doors to the public. To what extent has the applicant assured the execution of the stated items? (2 points max.)

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better  
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

-

**Panelist Comments:**

- ii. To what extent does the applicant include a description in its proposal showing how they intend to establish a detailed organizational & functional framework for the management and operation of the MBOC should include but not limited to; how the Center will recruit staff and clients as well as leverage its current roster of MBEs?) (1 point max.)

Rating Scale - points, if addressed: 0.5 pt at minimal level; 1.0 pts. at adequate level  
Zero points if not addressed

-

**Panelist Comments:****C. Work Requirements Execution Plan.  
(Maximum 7 Points)****Points Awarded:**

-

Panelist Name:  
Initials: \_\_\_\_\_

**Panel Definition:**

Assess the proposal as it relates to how effectively and efficiently all staff time will be used to achieve the work requirements, particularly with respect to periods beyond the start-up phase.

- i) To what extent does the applicant include a description for how it intends to deliver services in the defined geographic service area and the methodology for accomplishing the Work Requirements? (2 points max)**

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better  
**Zero points if not addressed** 1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:**

- ii) To what extent does the applicant include a detailed work plan, including an estimated client service hours to be delivered to clients (by MBE annual sales range - client fee chart) which delineates a schedule of proposed activities and milestones for implementing tasks under the award? (3 points max)**

-

Rating Scale - points, if addressed: 0.5 pt at minimal level; 1.0 pts. at adequate level  
**Zero points if not addressed** 2.0 pts at extended level; 3.0 pts at outstanding level

**Panelist Comments:**

- iii) To what extent does the applicant indicate how it will utilize staff to execute the work plan? Was a staff allocation summary provided? (2 points max.)**

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better  
**Zero points if not addressed** 1.5 pts at extended level; 2.0 pts at outstanding level

**Panelist Comments:**

End Section III

Panelist Name:  
Initials: \_\_\_\_\_

**-- UNOFFICIAL --****Minority Business Opportunity Center (MBOC)****Competitive Panel Evaluation Form****Section IV. Proposed Budget and Costs****Maximum Points Allowable = 20****Total Points Awarded:****-****Percentage Awarded:****0%****Instructions****Please do not enter data in gray cells**

For this criterion, applicants must submit separate budgets and narratives for each of the three funding periods.

Costs to the organization are expenses that it will incur in order for it to operate effectively. This section must contain a budget narrative. The budget narrative must provide information on how the money is going to

be used and why. The proposed budget must be appropriate to the work requirements of the MBOC and the applicant's proposal overall.

The budget narrative must provide sufficient information to justify line item expenditures in the SF-424A and the relationship to the program narrative.

The cost criterion is comprised of two parts:

- (a) Analyses of the reasonableness, allowability and allocability of costs.
- (b) Analysis of the applicant's proposed cost share.

**1. Reasonableness, Allowability and Allocability of Costs.**  
**(Maximum 5 points)**

**Points Awarded:****-****Panel Definition:**

Information is located in the Form SF-424A section and the "Proposed Budget/Costs" section of the program narrative. All of the proposed program costs expenditures should be discussed and the budget line item narrative must match the proposed budget. Fringe benefits and other percentage item calculations should match the the proposed budget line-item narrative.

- i. To what extent does the proposal provide an adequate descriptive narrative for each line item (by object class category) of the Federal and Non-Federal Costs in the proposed budget which justifies and sufficiently breaks down each proposed cost ? Did the applicant include detailed costs for staff participation, travel, and expenditures for the activities identified in the Announcement? (3 points max.)**

Points

Rating Scale - points, if addressed:

**Zero points if not addressed**

0.5 pts at minimal level; 1.0 pts. at adequate level

2.0 pts. at extended level; 3.0 pts. at outstanding level

- ii. Are the costs reasonable, allowable under the cost principals, and allocable to an MBEC Award? (1 point max.)**

Points

Rating Scale - points, if addressed:

**Zero points if not addressed**

0.5 pts at minimal level; 1.0 pts. at adequate level or better

**Panelist Comments:**

Panelist Name:

Initials: \_\_\_\_\_



## iii. To what extent are direct costs allocated to key consulting staff? (1 point max.)

Points

This is best evaluated as a percentage of total direct costs.

Calculate: sum of salary + fringe benefits divided by overall budget.

Rating Scale - points, if addressed:      0 pts if less than 40%  
Zero points if not addressed              0.5 pts if 40-59.9%  
   1.0 pt if 60% or better

Panelist Comments:

**2. Proposed Cost Sharing - Non Federal Cost Share**  
(Maximum 5 points)

Points Awarded:

-

**Panel Definition:**

Information is located in the Form SF-424A section and the "Proposed Budget/Costs" section of the program narrative.

**i. Applicant must propose at least a 20% non-Federal cost share amount of the total project cost. To what extent does the applicant's proposal meet the 20% non-federal cost share, and were client fees proposed? (3 points max.)**

Points

Rating Scale - points, if addressed:      3.0 points if 20% or more is proposed  
Zero points if not addressed  
Zero points if 10% cost share not met.

Panelist Comments:

**ii. Are commitment letters or other proper documentation from the non-federal cost share provider(s) attesting to the amounts included in the proposal? Reminder an original document is required for each. Failure to provide shall require an adjustment to the budget/proposal. (2 points max.)**

Points

Rating Scale - points, if addressed:      2 pts if all commitment letters included

Panelist Name:

Initials: \_\_\_\_\_

**Zero points if not addressed**

1.5 pts if 66-99% of all commitment letters included  
1 pt if 50-65% of all commitment letters included  
0.5 pts if 33-49% of all commitment letters included  
0 pts if less than 33% of commitment letters included

**Panelist Comments:****3. Performance Based Budget  
(Maximum 10 points)****Points Awarded:**

-

Assess to what extent does the line-item budget and budget narrative relate to the accomplishment of the MBOC work requirements and performance measures.

**i) Does the applicant discuss how the budget is related to the accomplishment of the work requirements and the Performance measures? (5 points max)**

Points

Rating Scale - points, if addressed:

**Zero points if not addressed**

1.0 pts at minimal level; 3.0 pts. at adequate level  
4 pts at extended level; 5.0 pts. at outstanding level

**Panelist Comments:**

**ii) Does the applicant provide a budget narrative that clearly links accomplishments of the work requirements to its Performance measures? If so, to what extent? (5 points max)**

Points

Rating Scale - points, if addressed:

**Zero points if not addressed**

1.0 pts at minimal level; 3.0 pts. at adequate level  
4 pts at extended level; 5.0 pts. at outstanding level

**Panelist Comments:**

Panelist Name:

Initials: \_\_\_\_\_

**End Section IV**

**-- UNOFFICIAL --****Minority Business Opportunity Center (MBOC)**

Competitive Panel Evaluation Form

**Section V - Non-Federal Cost Share Bonus**

Maximum Points Allowable = 5

Total Points Awarded:

-

**Panel Definition:**

Proposals with cost sharing for year 1 and 2 which exceeds 20% that is allocated to the MBOC will be awarded bonus points on the following scale:

- more than 20% but less than 25% = 1 point
- 25% or more, but less than 30% = 2 points
- 30% or more, but less than 35% = 3 points
- 35% or more, but less than 40% = 4 points
- 40% or more = 5 points

Information is located in the Form SF-424A section and the "Proposed Budget/Costs" section

**1. Non-Federal Cost Share Bonus Points (Maximum of 5 Points)**

Points Awarded:

What percent over the required 20% non Federal Cost Share did the applicant propose for all program years?

**Panelist Comments:**

End Section VI - Oral Presentation

Panelist Name:  
Initials: \_\_\_\_\_

**-- UNOFFICIAL --****Minority Business Opportunity Center (MBOC)**

Competitive Panel Evaluation Form

**Section VI. Oral Presentation****Oral Presentations are optional and only at the request of MBDA**

Maximum Points Allowable = 10

Total Points Awarded:

-

Percentage Awarded:

0%

**Instructions****Please do not enter data in gray cells**

Oral presentations are optional and held only when requested by MBDA. This action may be initiated for the top two (2) ranked applications for each project and will be applied on a consistent basis for each project competition. Oral presentation will be used to establish a final evaluation and ranking.

The applicant's oral presentation will be evaluated as to the extent to which the presentation demonstrates the following:

- a) **To what extent does the applicant demonstrate how they will effectively and efficiently assist MBDA in the accomplishment of its mission? (2 points max.)**

Points

Rating scale - points, if address:

0.5 pts at minimal level; 1.0 pts. at adequate level

Zero points if not addressed

1.5 pts. at extended level; 2.0 pts. at outstanding level

**Panelist Comments:**

- b) **How did the applicant demonstrate its business operating priorities designed to manage a successful MBOC ? (2 points max.)**

Points

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level

Zero points if not addressed

1.5 pts. at extended level; 2.0 pts. at outstanding level

**Panelist Comments:**

- c) **To what extent did the applicant describe its management philosophy that will achieve an effective balance between micromanagement and complete autonomy for its Project Director? (2 points max.)**

Points

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts. at extended level; 2.0 pts. at outstanding level

**Panelist Comments:**

- d) **To what extent did the applicant outline its robust search criteria for the identification for its Project Director? Director? (1 point max.)**

Points

Panelist name:

Initials:

Section VI - Page: 29

Rating Scale - points, if addressed:  
Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

**Panelist Comments:**

e) To what extend did the applicant discuss and explain its effective employment recruitment and retention policies and procedures? (1 point max.)

Points

Rating Scale - points, if addressed:  
Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

**Panelist Comments:**

f) To what extend did the applicant demonstrate a competitive and innovative approach to exceeding performance requirements? (2 points max.)

Points

Rating Scale - points, if addressed:  
Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better  
1.5 pts. at extended level; 2.0 pts. at outstanding level

**Panelist Comments:**

**End Section VI - Oral Presentation**